ProjNet
User Manual

US Army Corps
of Engineers
Baltimore District

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Introduction

The ProjNet system is a management tool developed to facilitate design reviews and improve the construction quality of federal projects. As an internet-based system, it is readily accessed and used by designers, reviewers, customers, and other project stakeholders to record review comments and responses, document decisions made, and capture lessons learned. The ProjNet system is currently being used by over 30 federal agencies.

This ProjNet User Manual is designed to assist the USACE Baltimore District ProjNet users with utilizing the system and its features. The manual is organized into four main sections (Getting Started, DrChecks, Lessons Learned, and Technical Support). A Table of Contents has been provided for referencing the subsections.

The terms **Local Administrator** and **Site Administrator** used throughout this manual refer to the individuals who assist ProjNet users with registration, project access, and technical guidance. The Local Administrator contacts are currently:

Jean Swalley
(410) 962-3880
Jean.Swalley@nab02.usace.army.mil

Richard Sealover (alternate)
(410) 962-4153
Richard.A.Sealover@nab02.usace.army.mil

The Site Administrators may be contacted at:

Resource Center Enterprises (RCE)
(800) 428-4357
(217) 367-3273
jmoll@interserv.com

Introduction (continued)

This manual assumes that the user is already familiar with the Microsoft Windows interface. If you need assistance with Windows features (cutting and pasting, attaching files, etc.), contact a Local Administrator for assistance.

The manual will be updated and redistributed periodically to ensure that the information and guidance provided is current, accurate, and effective. Submit recommendations for changes to a Local Administrator for incorporation in the next edition.
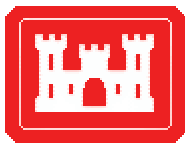
Registration

1. The first step for registration is to obtain the office password assigned to the your office, company, or USACE section. To obtain the password:

<u>USACE Employees</u> - Contact a Local Administrator. Provide them with your office code (i.e.CENAB-EN-D).

<u>Customers, A-E's (new offices)</u> - For offices new to the ProjNet system, obtain an Office Setup Request Form from a Local Administrator. Complete and return the form. The Local Administrator will coordinate with the ProjNet Site Administrators to establish an online account for your office. The Point of Contact (POC) indicated on the form will be contacted by a Site Administrator who will verify the account information and provide the office password

<u>Customers, A-E's</u> - Contact the designated Point of Contact (POC) within your office/company to obtain the office password. If you do not know who the POC is for your office, contact a Site Administrator.

> *__Note:__ Each separate office (i.e. customer office, A-E firm, contractor, USACE office section, etc.) is assigned a unique office password. You will only use this password when you register.*
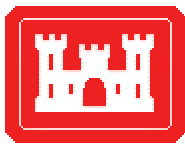
Registration (continued)

2. From Internet Explorer, type in the web address http://www.projnet.org and enter.

3. Under "First Time Users", select USACE as the agency and click on "Register".
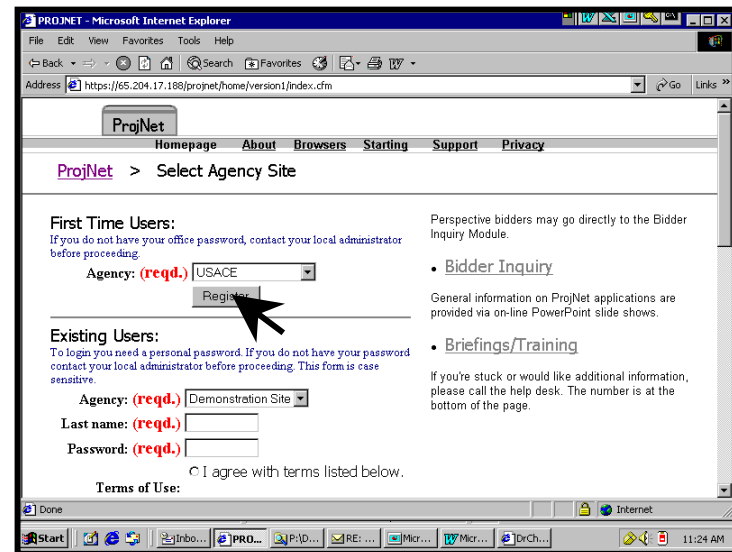
Registration (continued)

4. Read the Terms and Conditions, and click on "I agree".
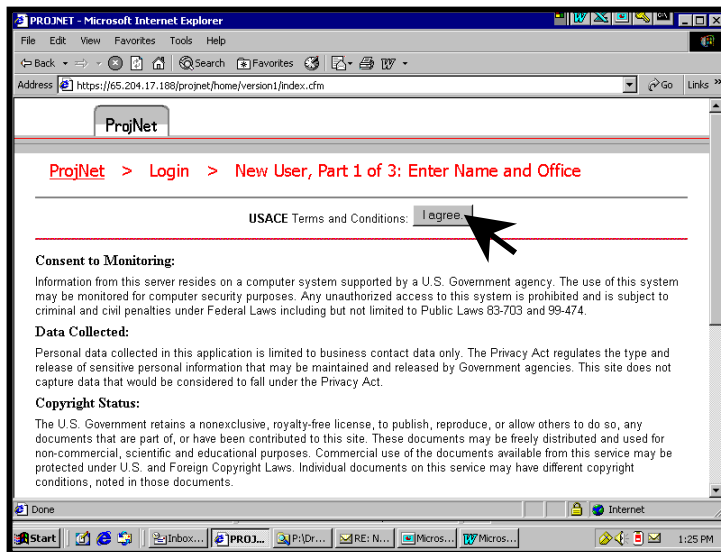
__Note:__ By selecting "I agree", you are indicating that you have read and understand the Terms and Conditions for using the ProjNet system.

5. Select the appropriate site from the pull-down menu, and click on "Go".
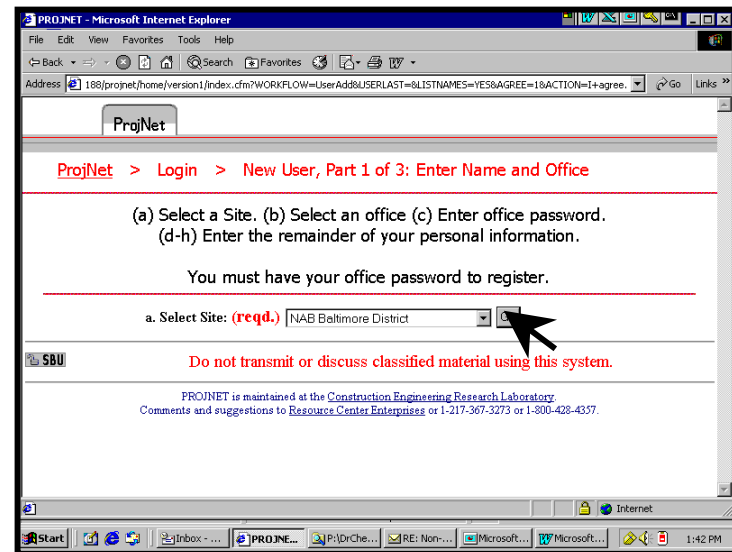
__Note:__ If you're a USACE employee, select NAB Baltimore District as the site. Otherwise, select Customer, Design (A-E), Contractor, etc. as appropriate. If you aren't sure which site to select, contact a Local Administrator for assistance.

Registration (continued)

6. Complete the registration information requested, and click on "Continue".

7. Your personal password will be displayed. Document this for future use.

Note: *Your personal password is case sensitive. Be sure to copy it down exactly as it appears on screen.*
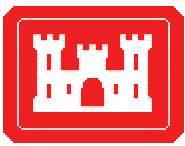
Registration (continued)

8. Scroll down the screen, provide a secret question/answer, and click "Continue".

9. You are now registered.

Note: *The secret question is used by ProjNet administrators to verify your identity. The question should be one that only you would readily know the answer to (such as "What is my dog's name?").*

Note: *You will automatically be assigned default functions (i.e. designer, reviewer, etc.) based on your selected site. Local Administrators can assign special functions to you (i.e. project manager, review manager, etc.) as required.*
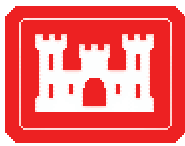
Logging In

1. Select USACE as the agency. Enter your last name and password. Click "Login".

2. Once logged in, the ProjNet hompage screen will be displayed.

Note: *If you have forgotten your password, contact a Local Administrator (if a USACE employee) or a Site Administrator (if a Customer, A-E, or other non-USACE user).*
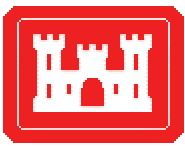
Program Overview

1. Select the "ProjNet" tab at any time to return to the ProjNet homepage. You can also return to the homepage by clicking the "ProjNet" link.
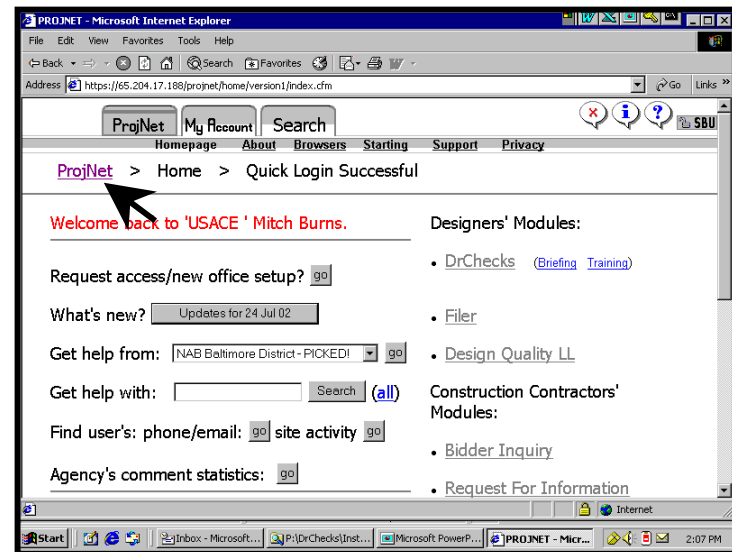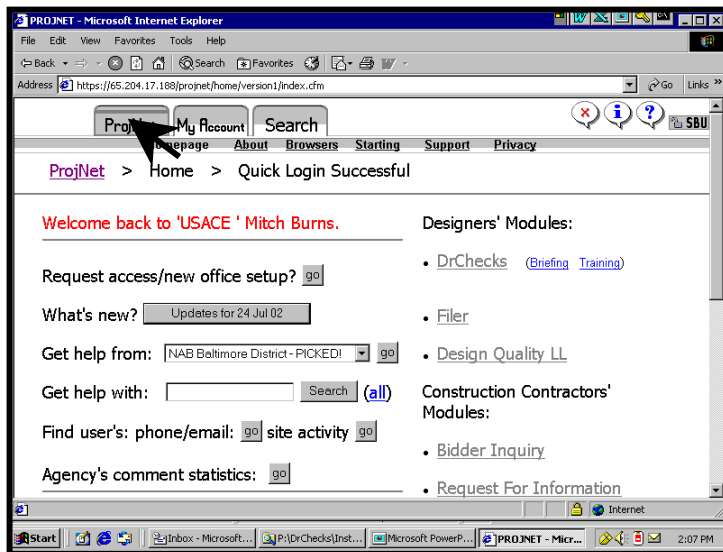
Program Overview (continued)

2. To review and update your account information, select the "My Account" tab at the top of the screen.
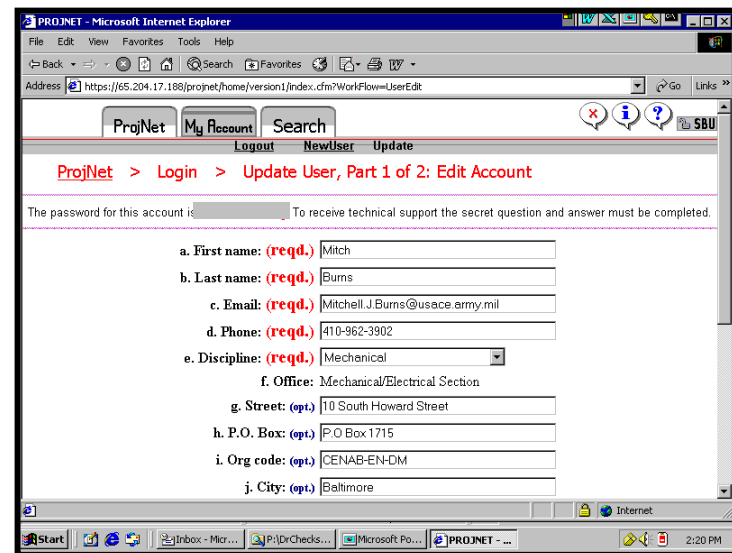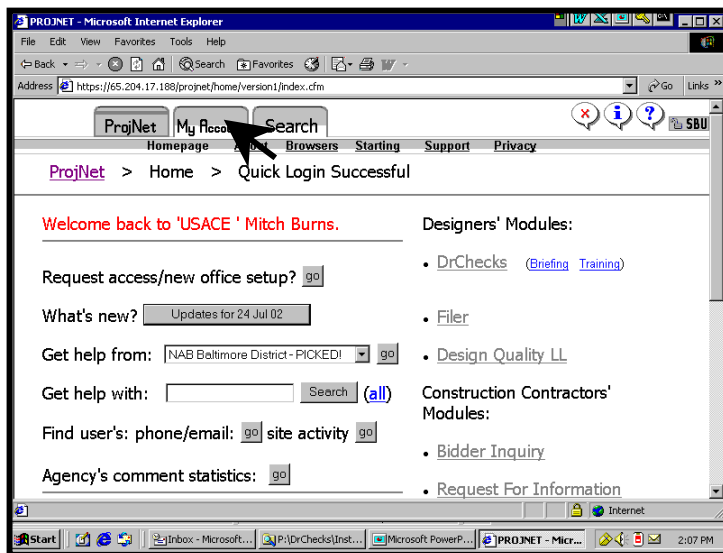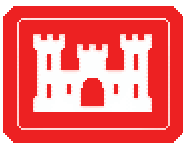
Program Overview (continued)

3. For a summary of the latest ProjNet updates, go to the "What's new?" screen.
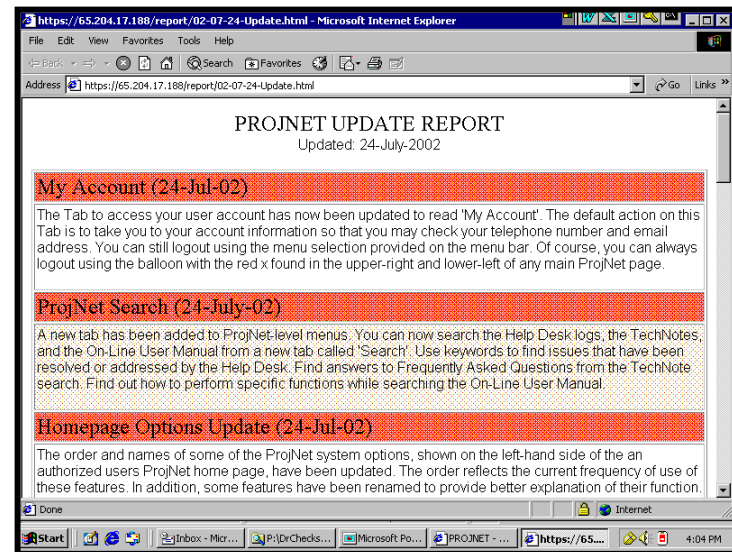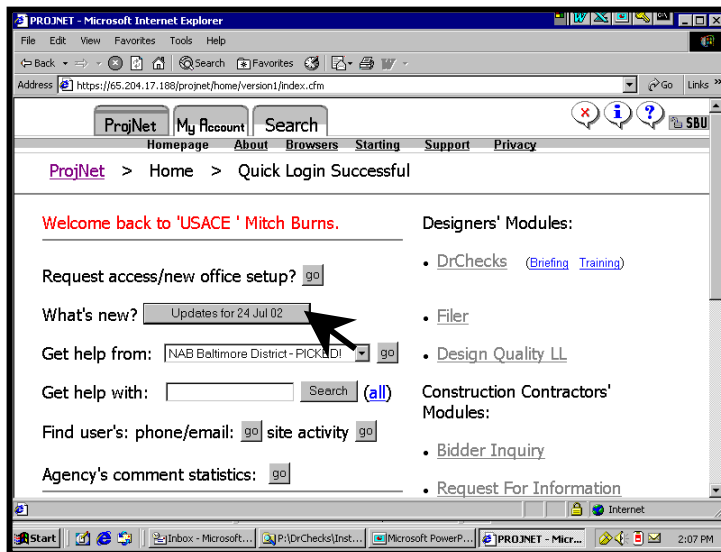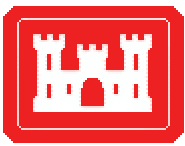
Program Overview (continued)

4. To use a ProjNet program, select the link from among the available modules listed on the right side of the screen.
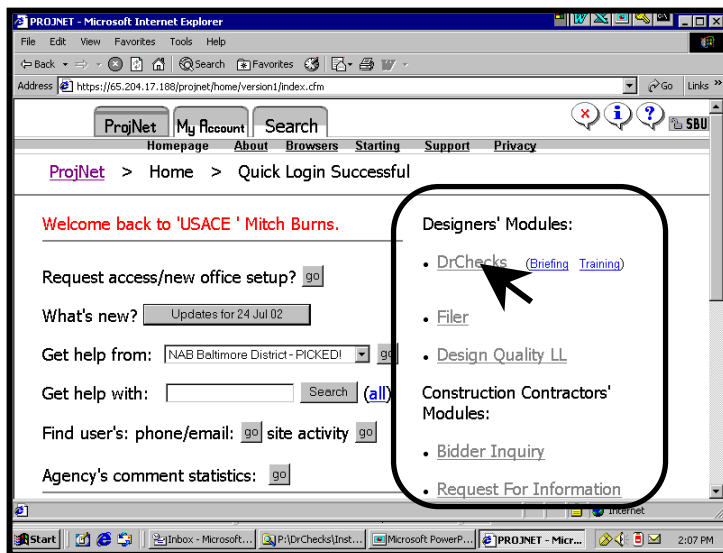
DrChecks Overview

The DrChecks System is a review management tool designed to improve the review process by facilitating communication and documentation. As on online system, it provides an accessible forum for communication among designers, reviewers, customers, and other stakeholders regardless of their geographic location. It records review comments and responses, and provides for the attachment of related correspondence, graphics, and other project documentation. It also provides a variety of reporting options for real-time project tracking.

To access the module, select the **DrChecks** link from the ProjNet homepage**.**
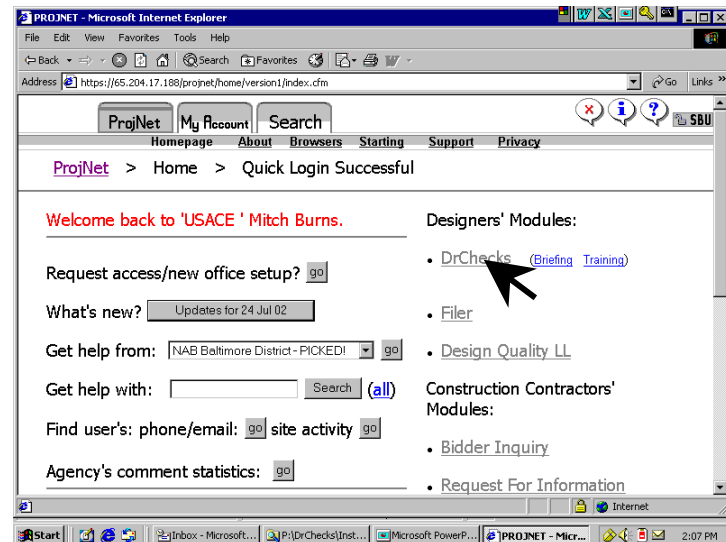
Selecting Reviews

1. Click on the "Project" tab at the top of the screen.
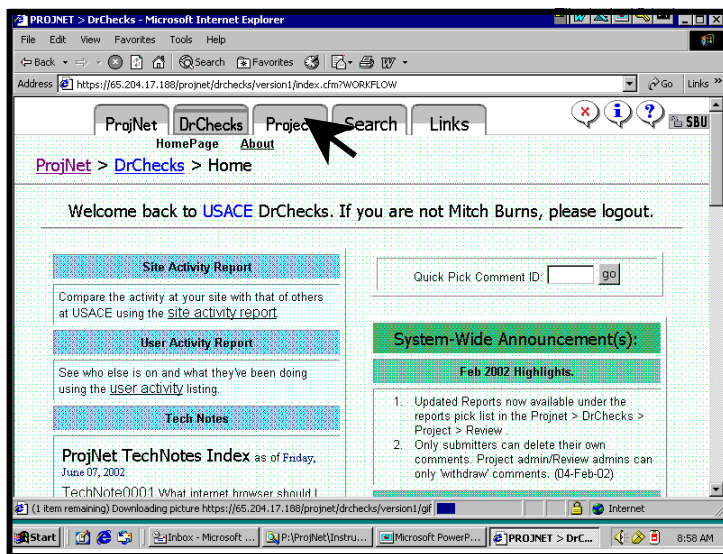
2. A list of projects you have access to will be displayed. Scroll to locate the project.
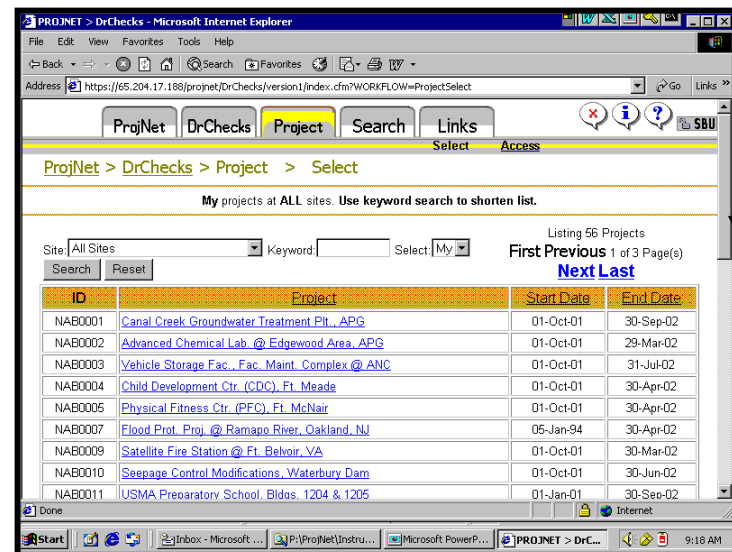
__Note:__ If the project list is more than one page long, use the "First", "Next", "Previous", and "Last" links to view the complete list of available projects.

Selecting Reviews (continued)

3. The default display lists projects in the order of their ID numbers. To reorder alphabetically or by review date, click on the corresponding column heading.

Selecting Reviews (continued)

4. You can also search for projects by a keyword. Any projects with the keyword in the title are displayed.

*<u>**Note**</u>: The projects displayed are those to which you have been assigned access. If your search doesn't return the project you need, contact a Local Administrator for access.*

Selecting Reviews (continued)

5. When you've located the project, click on the project title.
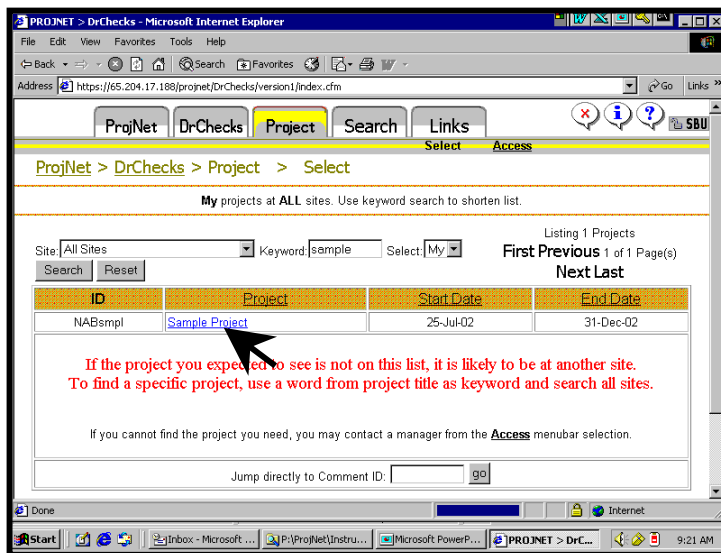
6. The available reviews for the selected project are displayed.
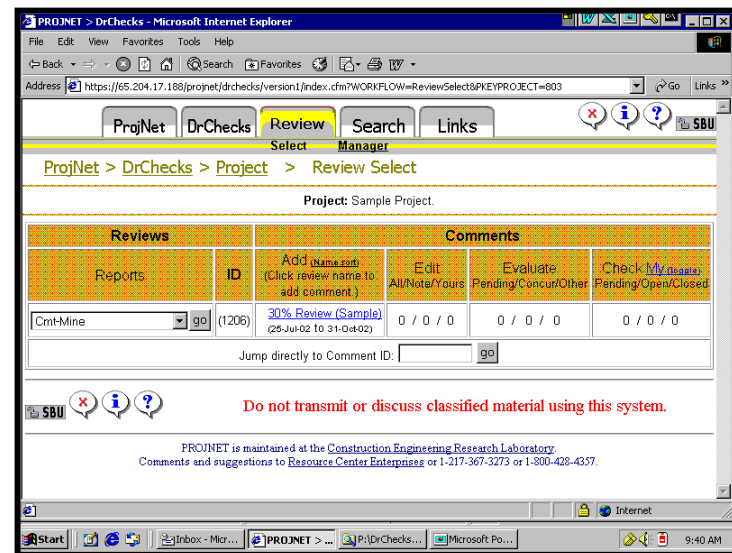
__Note__: The reviews displayed are those to which you have been assigned access. If you need a project review that is not displayed on your screen, contact a Local Administrator.
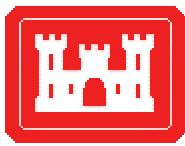
Adding Comments

1. Click on the review title.
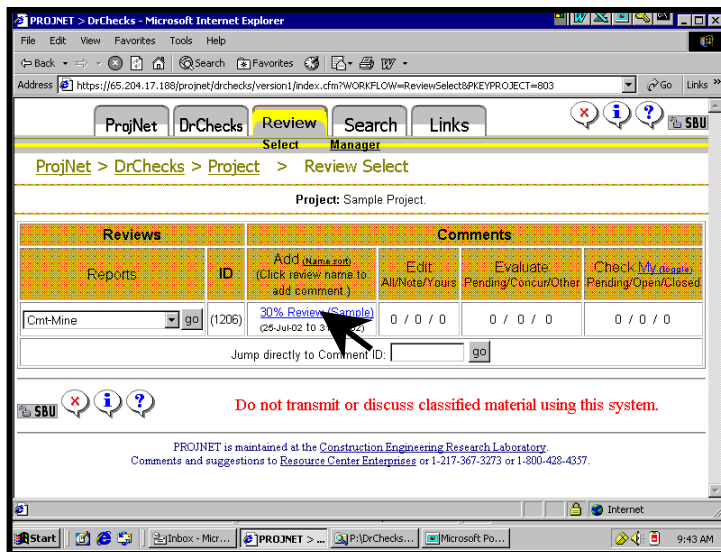
2. Select the discipline from the menu that best matches the subject of the comment.
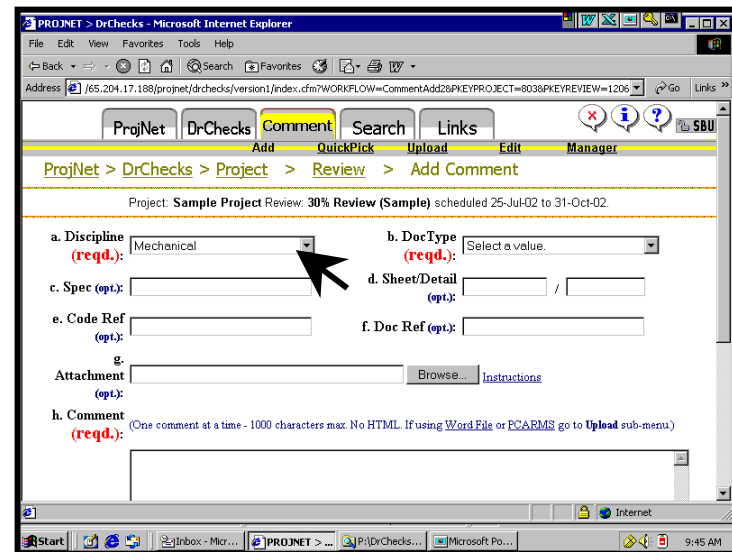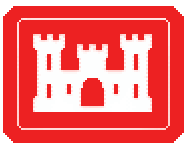
Adding Comments (continued)

3. Select the type of review document(s) that the comment is based on.

4. Complete the pertinent information as necessary to reference the comment.

Adding Comments (continued)

5. If desired, attach reference files to the comment using the "Browse" feature.

6. Type the comment into the field provided.

Adding Comments (continued)

7. Click on "Yes" for Lessons Learned if the comment is to be considered as a DQLL.

Note: See the discussion on lessons learned in the Design Quality Lessons Learned (DQLL) section of this manual.

8. Click on "Yes" for Critical Issue to flag the comment as a high priority.

Note: Flag comments as critical if they significantly impact the schedule, budget, or scope, or if they require immediate attention by the Design Team Leader, Project Manager, or Customer.
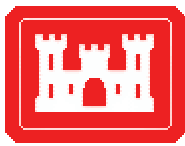
Adding Comments (continued)

9. Click on "Add Comment" to submit the comment and return to comment screen.

10. The required fields will default to the previous information.

Note: *The "Add & Copy" and "Add & Clear" buttons also submit the comment. "Add & Copy" returns the comment screen with previous comment information still shown. "Add & Clear" returns the screen with all blank fields.*

Adding Comments (continued)

11. Repeat steps 2-9 until all comments are added. Click on the "Review" link.

12. The recorded comments are shown by the numbers in the "Edit" column.

<u>Note</u>: If the numbers in the "Edit" column don't reflect the comments you have entered, contact a Local Administrator for assistance.

Selecting Comments
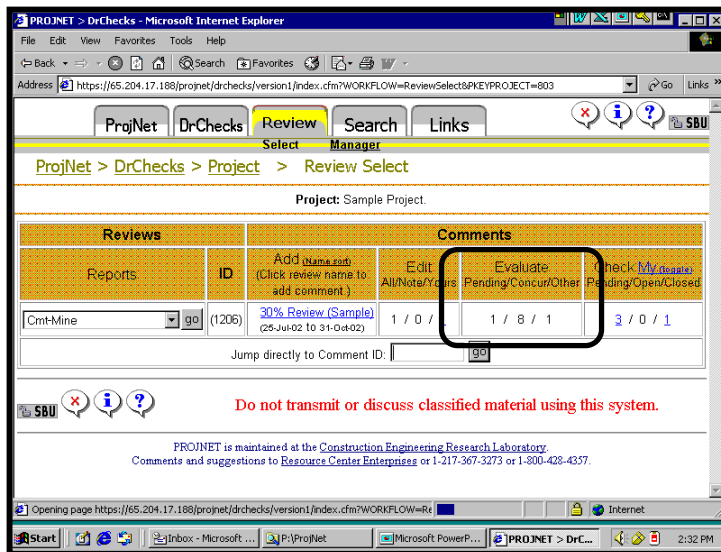
1. The status of submitted comments is reflected in the Comments columns.

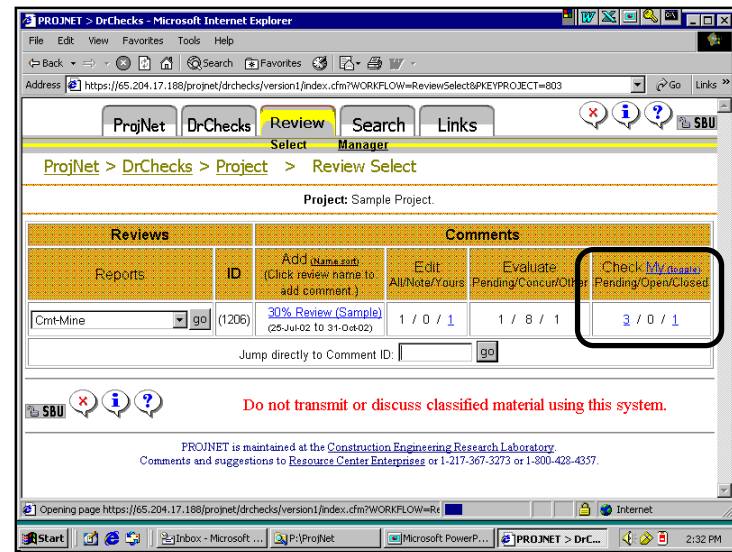2. The "Edit" column indicates comments that have not been evaluated.

ProjNet - DrChecks
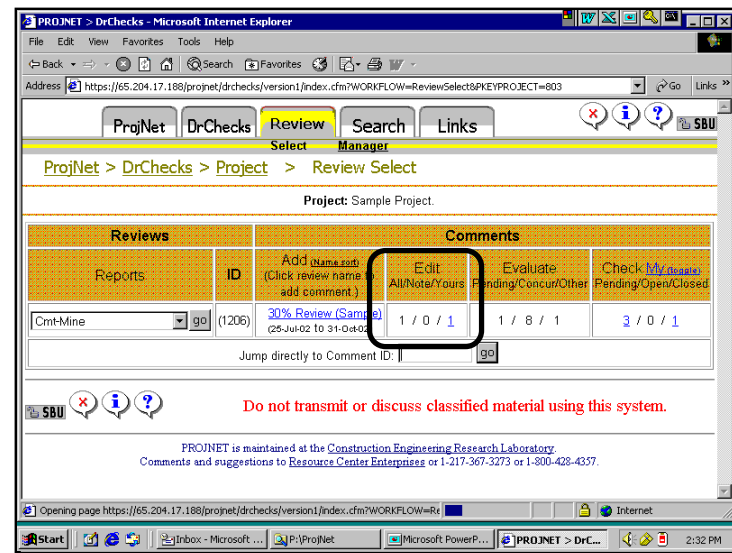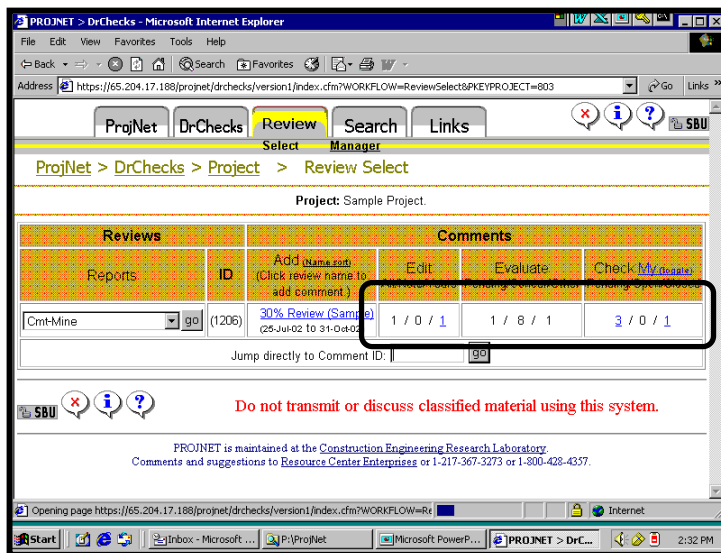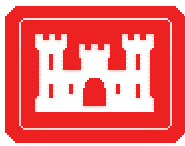
Selecting Comments (continued)

3. The "Evaluate" column shows the evaluation status of all comments.

4. The "Check" column default shows the backcheck status of your comments.
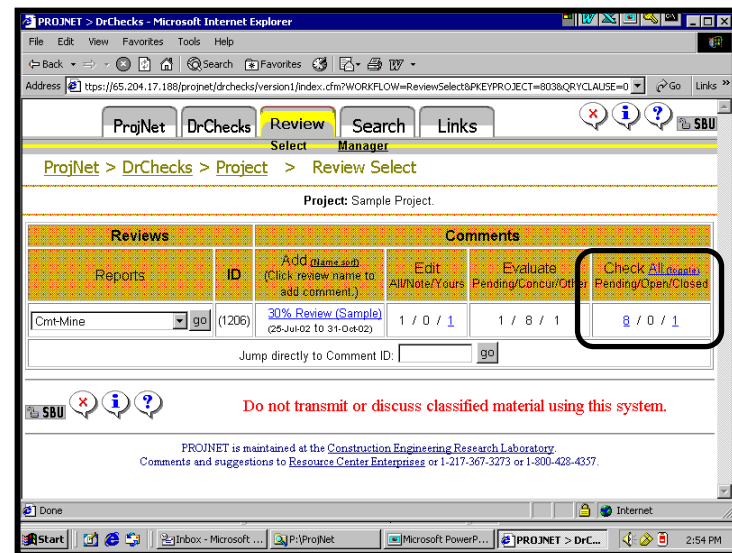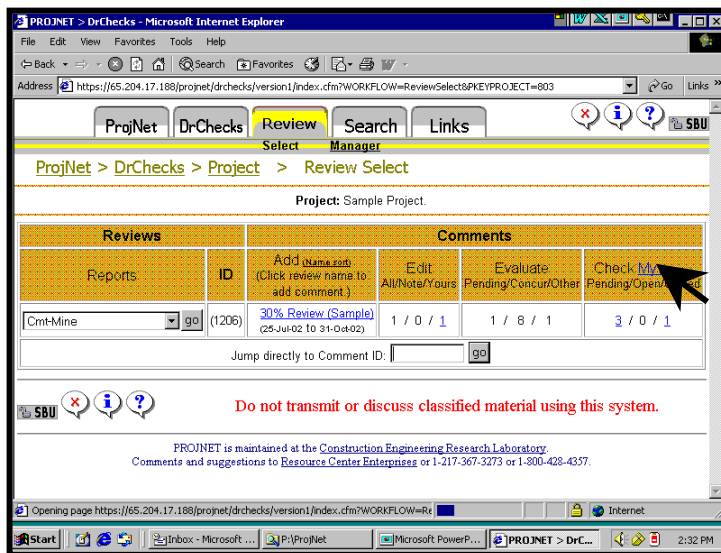

Note: *"Pending" means that the action (evaluation or backcheck) has not yet been performed..*
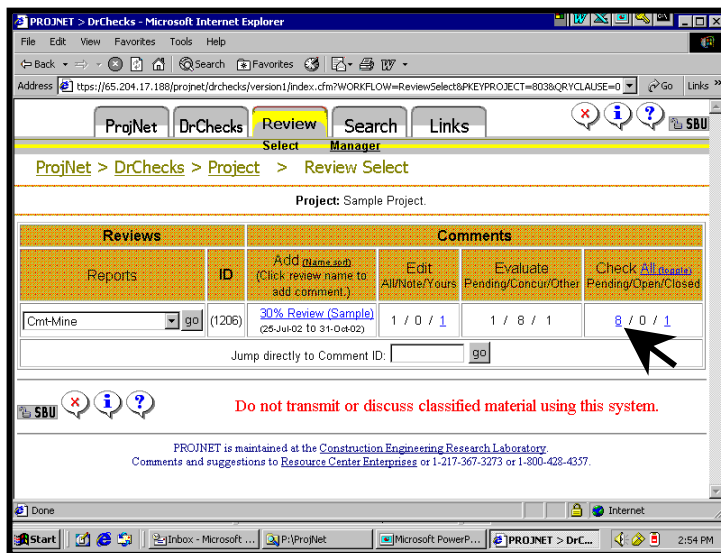
http://www.projnet.org

Selecting Comments (continued)

5. To display the backcheck status of all comments, click on the blue highlighted word "My" in the "Check" column heading to toggle the link to "All".
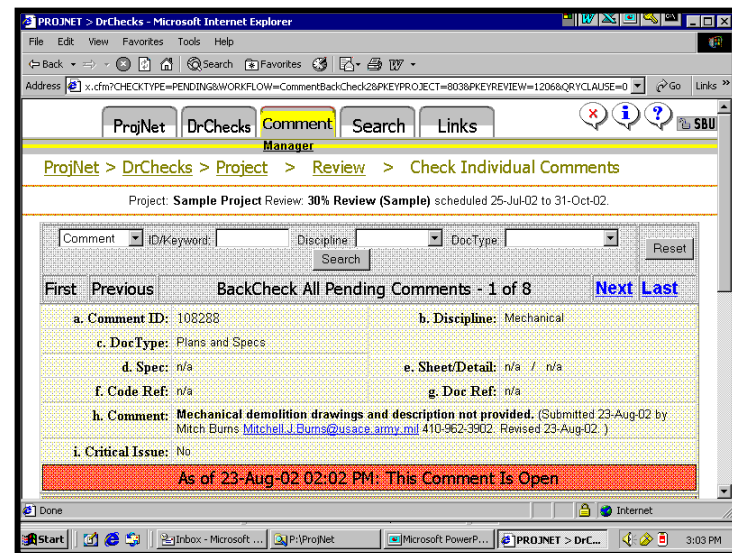
Selecting Comments (continued)

6. To view the Comment pages, click on the appropriate highlighted number link.
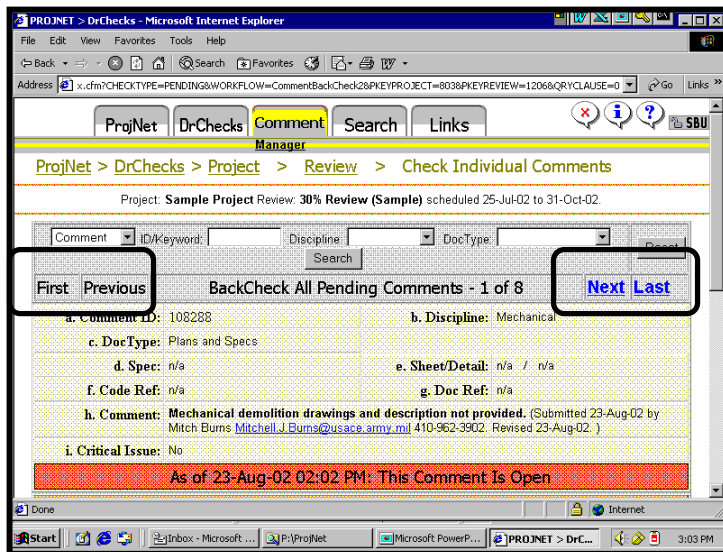

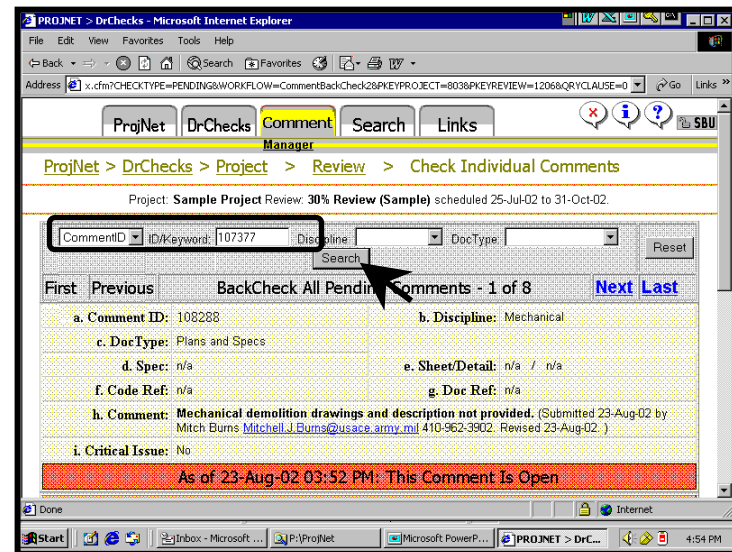7. The Comment screen displays submitted comments one at a time.

Selecting Comments (continued)

8. Use "First", "Previous", "Next" and "Last" links to view individual comments.
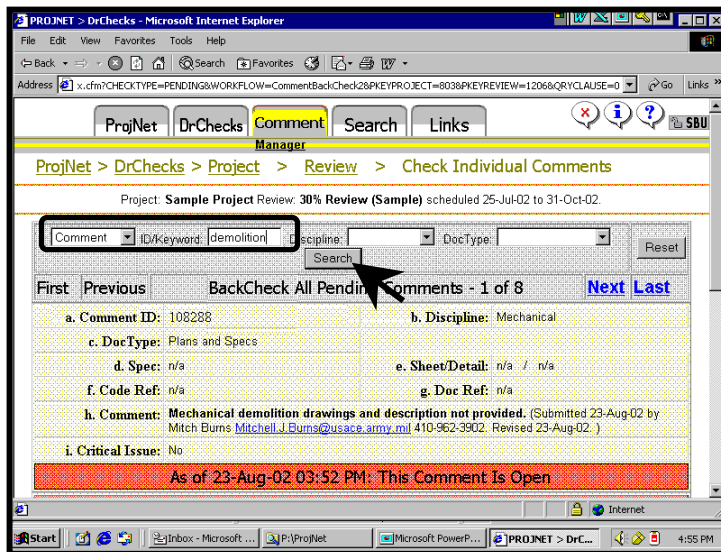
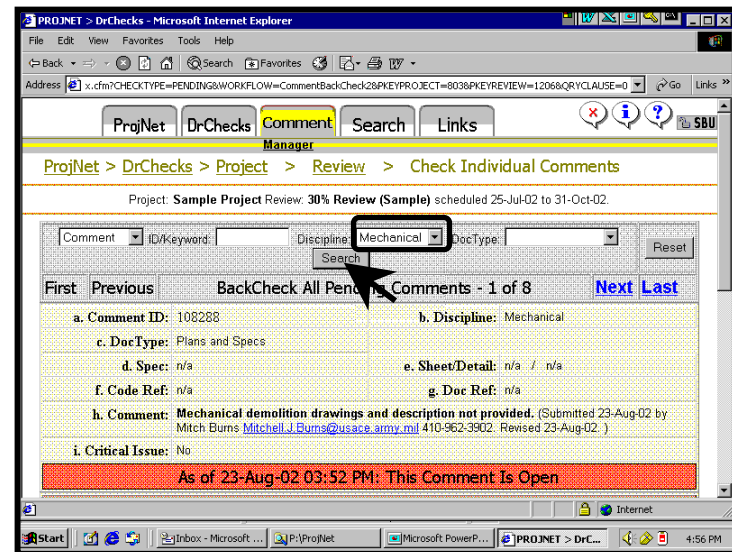9. To search for a comment by number, select "Comment ID" and enter number.

Selecting Comments (continued)

10. To search for comments by topic, select "Comment" and enter a keyword.
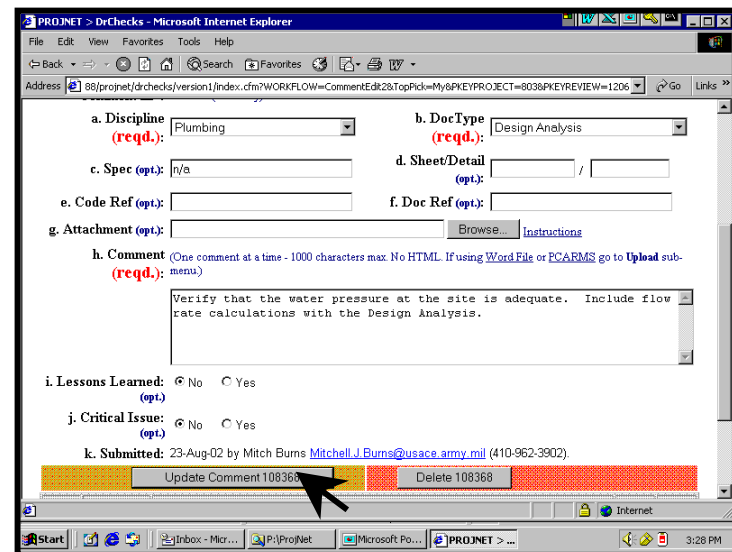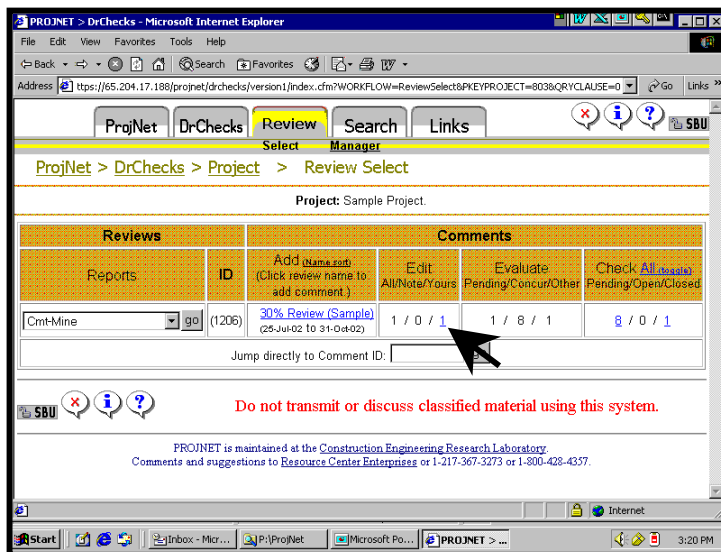

11. To search for comments by discipline or document type, select the menu category.

Editing/Deleting Comments

1. Access your comments by clicking on the number link in the "Edit - Yours" column.

2. Locate the comment, make the changes, and click "Update Comment".

Note: For tips on searching and filtering comments, see the "Selecting Comments" section of this manual.

Editing/Deleting Comments (continued)

3. To delete the comment entirely, click "Delete".

Evaluating Comments

1. From the review page, click on the link in the "Evaluate - Pending" column.

2. The Comment screen displays pending comments one at a time.

Evaluating Comments (continued)

3. Review the submitted comment, including any attached reference files.
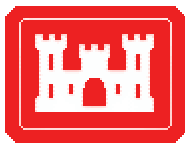
4. Scroll down to the evaluation section, and select the appropriate response.

Evaluating Comments (continued)

5. Enter pertinent evaluation information in the "Discussion" field.

6. Indicate any potential impacts of incorporating the comment .

<u>Note</u>: Indicate potential impacts of comments on project scope, cost, and schedule to ensure the reviewers and other stakeholders are informed.
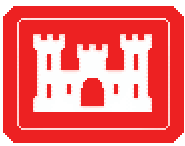
Evaluating Comments (continued)

7. Attach any related reference files to the comment using the "Browse" feature.
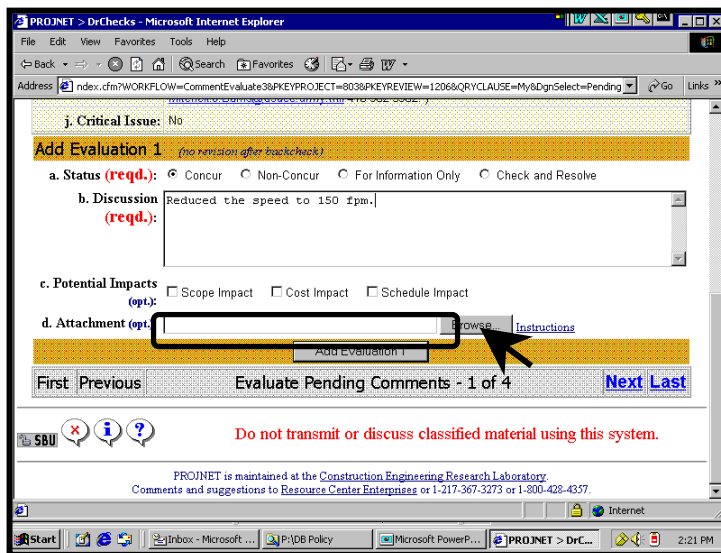
8. To enter the response, click the "Add Evaluation" button.
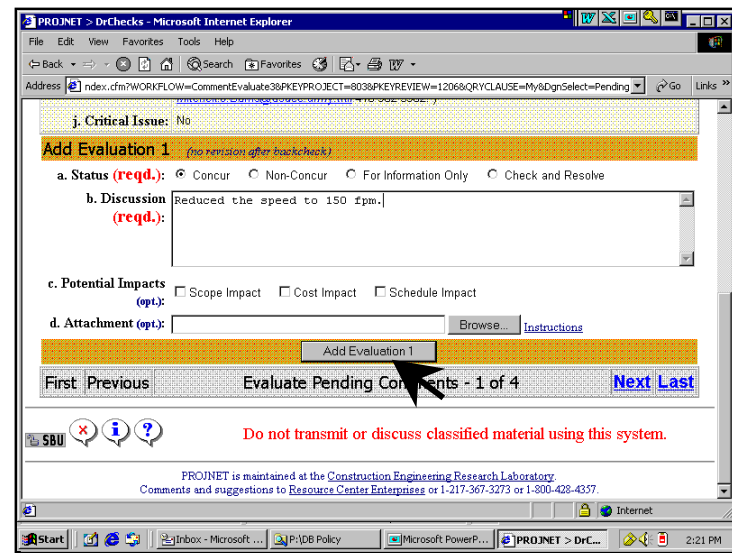
<u>Note</u>: Clicking on "Add Evaluation" submits the evaluation and returns to the next pending evaluation.
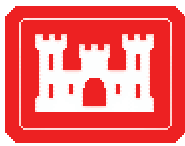
Editing/Deleting Evaluations

1. To edit or delete submitted evaluations, click on the appropriate link in the "Evaluate" column on the Review page. Revise the evaluation, and click "Update" or "Delete" as appropriate.
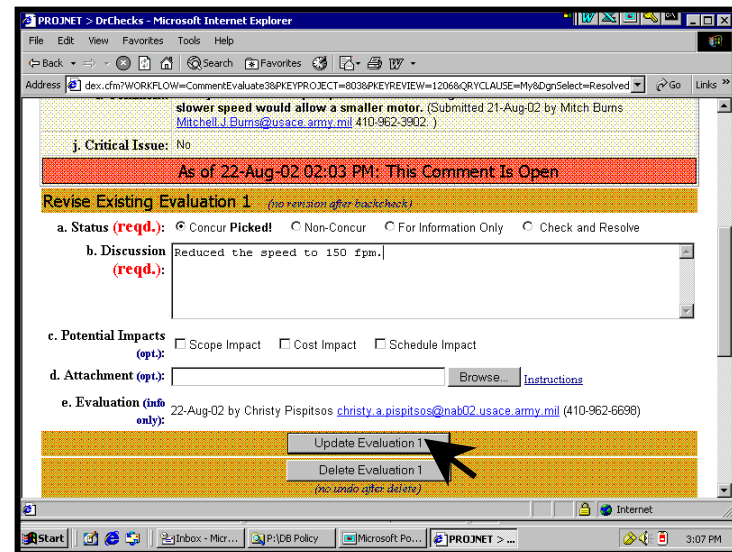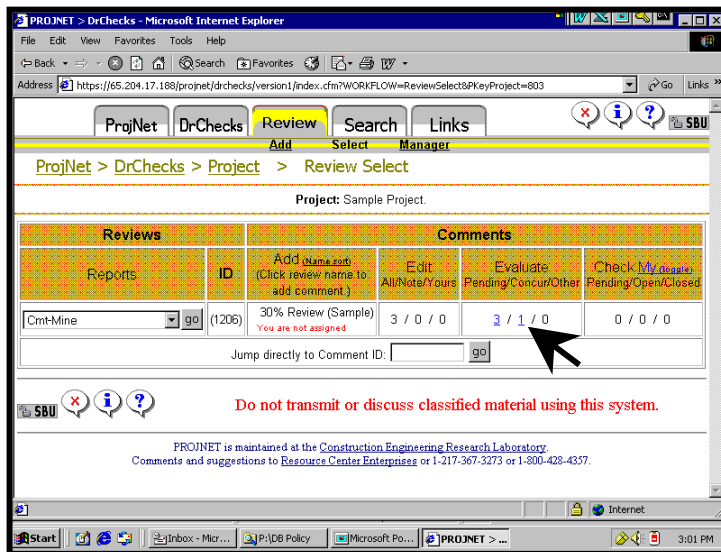
<u>Note</u>: Evaluations can only be edited or deleted by the original author, a review manager, or an administrator. Evaluations cannot be edited once the comment has been backchecked.

Backchecking Comments

1. From the Review page, click on the link in the "Check - Pending" column.

Note: *If the numbers in the "Check" column aren't highlighted, then the review may not have been opened for backcheck yet. Contact a Local Administrator for verification.*

2. Review the submitted evaluation(s), including any attached reference files.
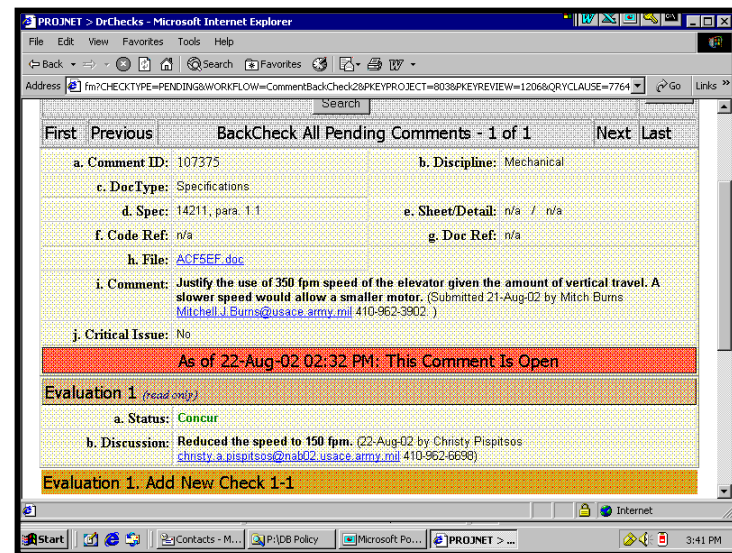
Note: *For tips on viewing and searching comment, see the "Selecting Comments" section of this manual.*

Backchecking Comments (continued)

3. Scroll to the "Add New Check" section. Select "open" or "close" for the comment.
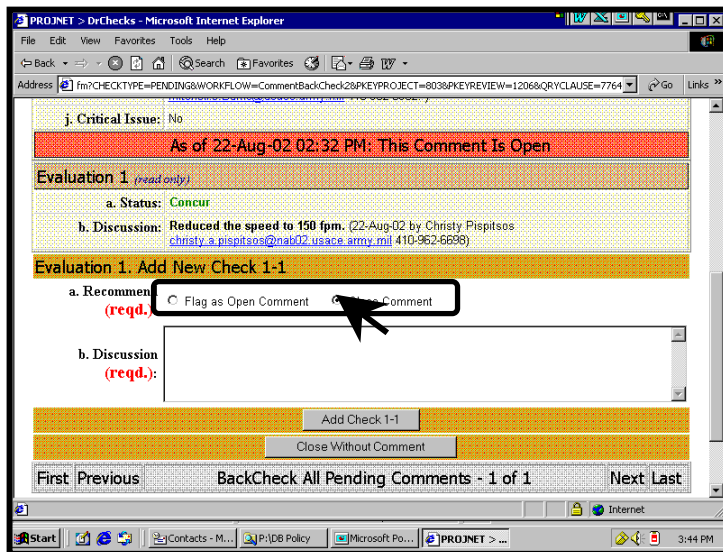
4. If the comment is to be closed, click on "Close Without Comment".
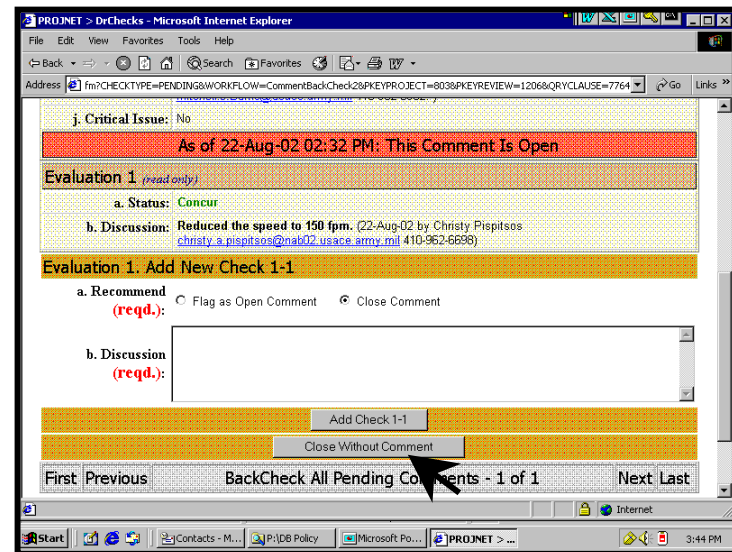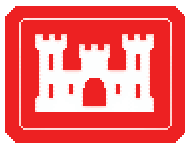
Backchecking Comments (continued)

5. If the comment is flagged open, provide an explanation in the "Discussion" field. Then submit the backcheck comment by clicking "Add Check".

Tracking Features

1. The pull-down menu in the "Reports" column lists a variety of report options.

2. Select the desired report option and click "Go".
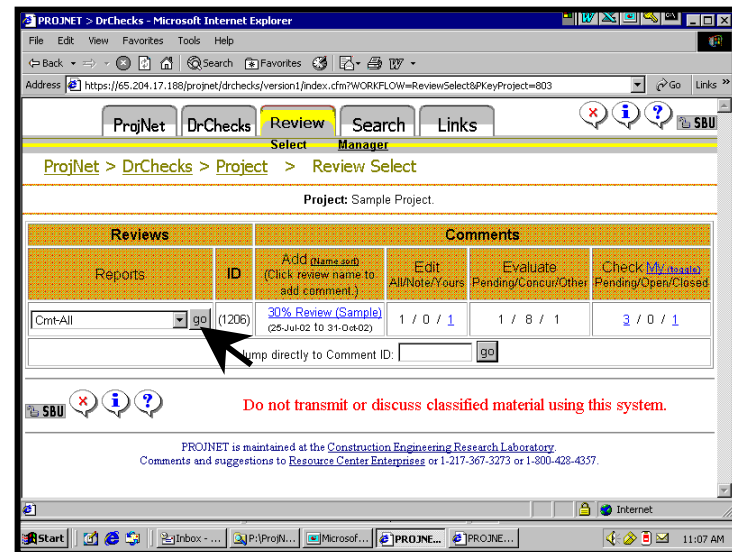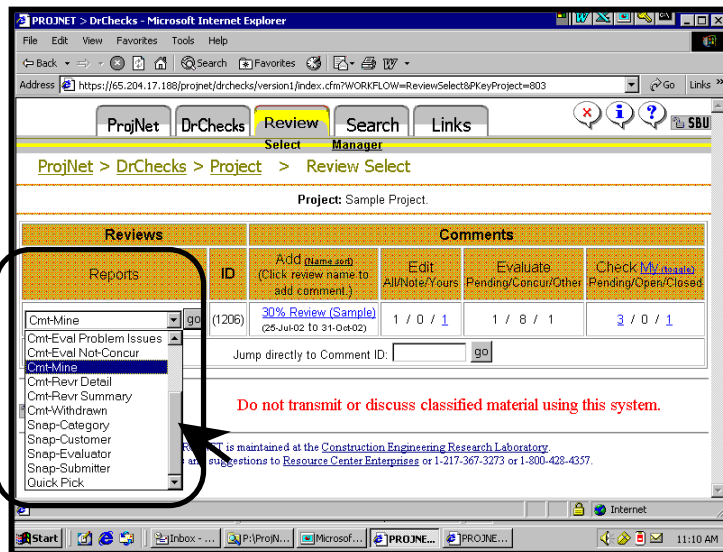
Tracking Features (continued)

3. For a list of the comments, including the full evaluation and backcheck history, use a "Cmt -" report. Comments can be reported by reviewer/evaluator, closure status, and priority.
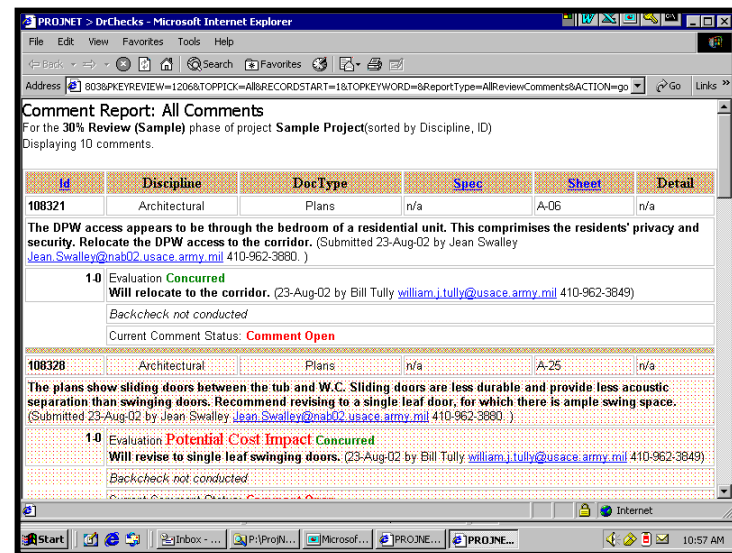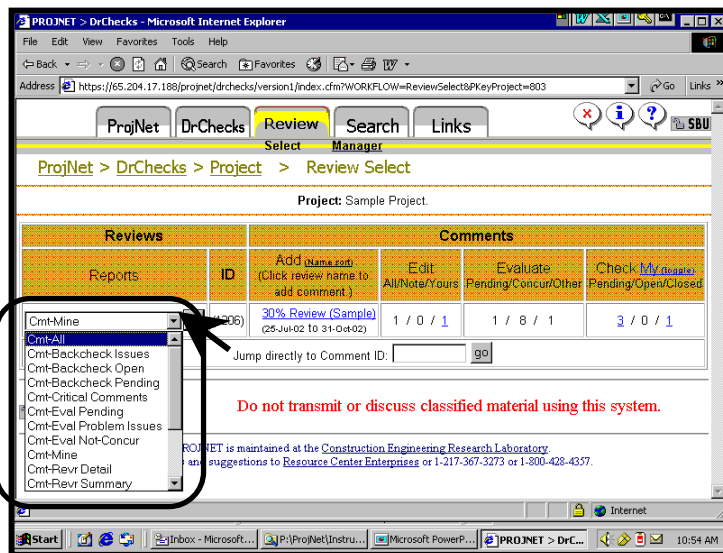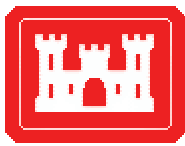
Tracking Features (continued)

4. For a summary of comments and evaluations, use a "Snap -" snapshot report. Comments can be summarized by category, reviewer/evaluator, and closure status.
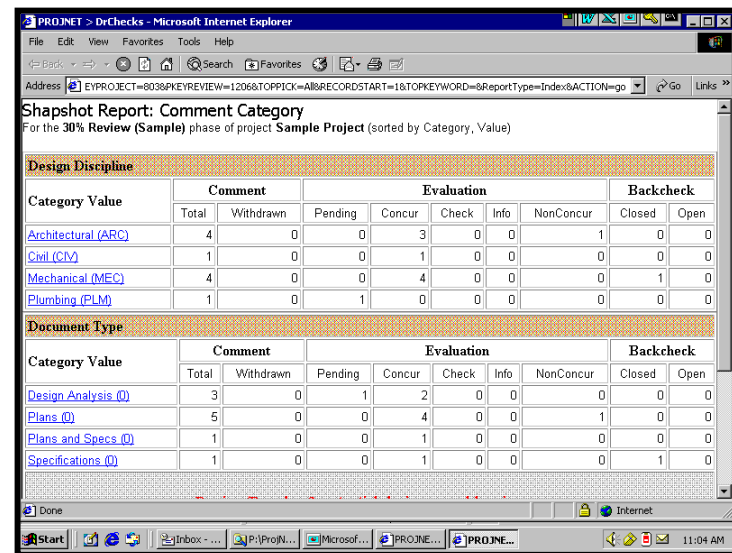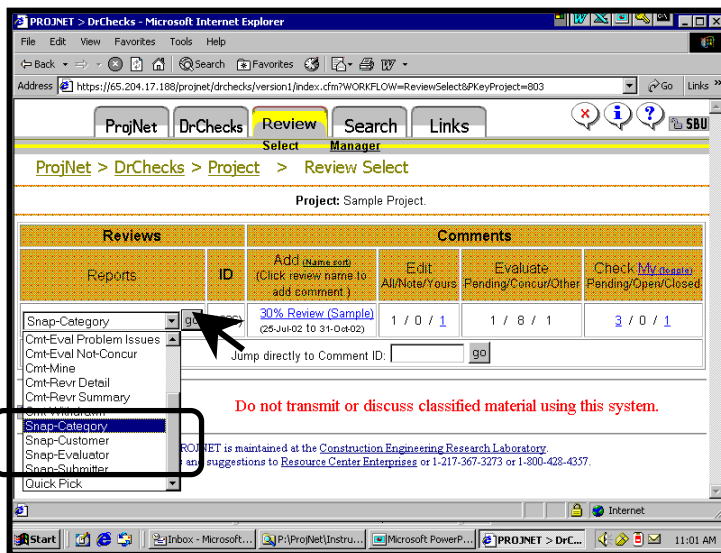
Tracking Features (continued)

5. Use the "Quick Pick" feature to customize a comment report by project, discipline, author, and/or keyword. Complete the required information and click "Find Quick Pick Comments".
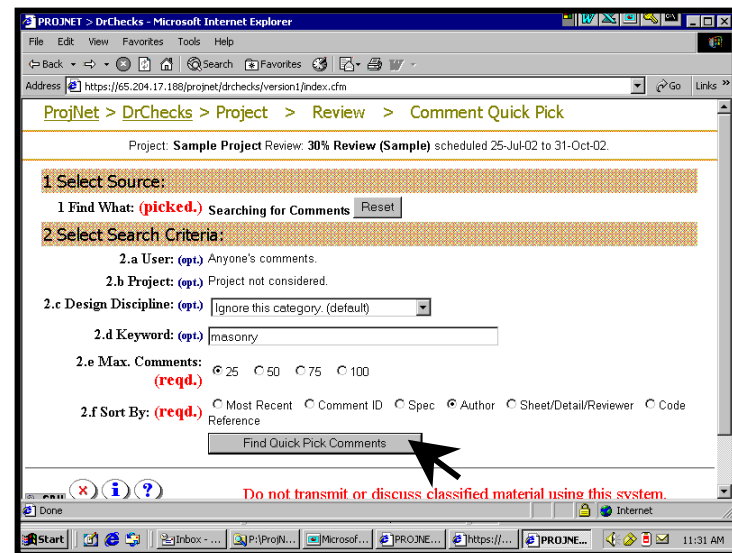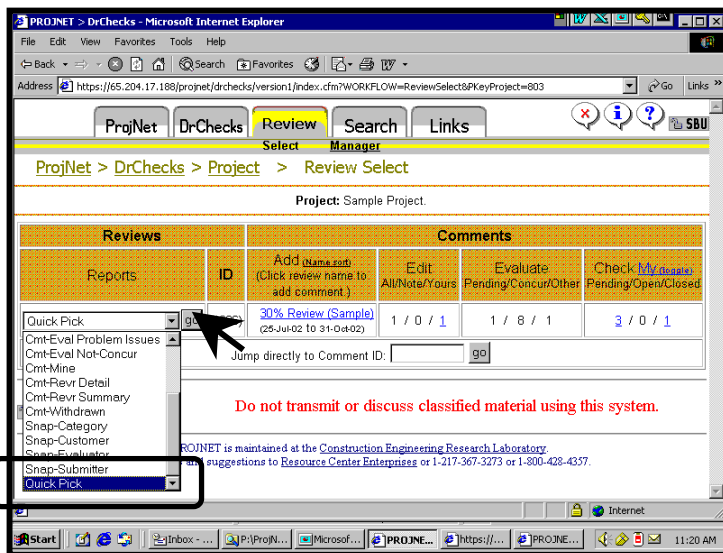
Design Quality Lessons Learned (DQLL) Overview

The Design Quality Lessons Learned (DQLL) System documents lesson learned from errors and omissions, success stories, and improved work practices. It can also be utilized to identify customer- or location-specific criteria.

The DQLL System provides for the submittal, evaluation, and searching of lessons learned. To access the DQLL features, go to the main ProjNet page and select **Design Quality LL**.

ProjNet - DQLL
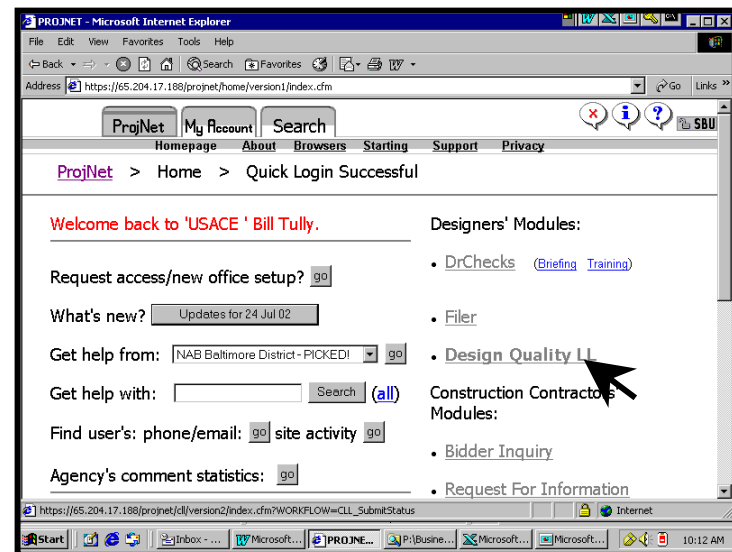
Submitting Lessons Learned

1. Click on the "Submit" tab at the top of the screen.

2. Select the relevant categories one at a time, clicking on "Add" for each one.
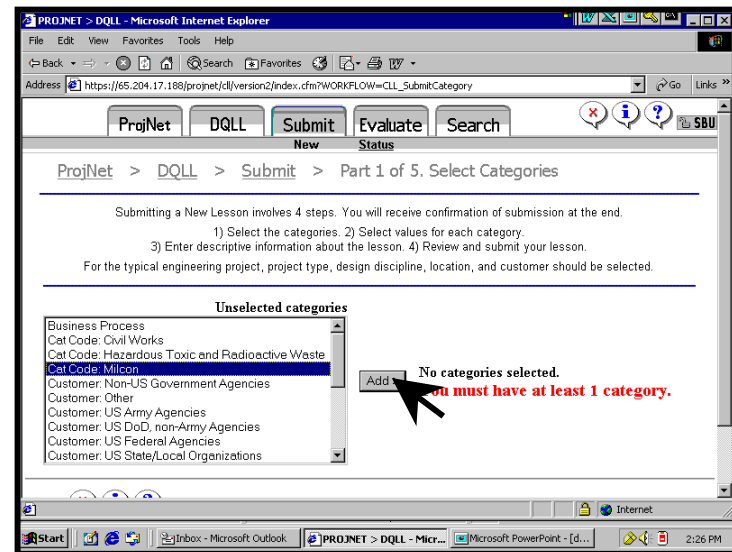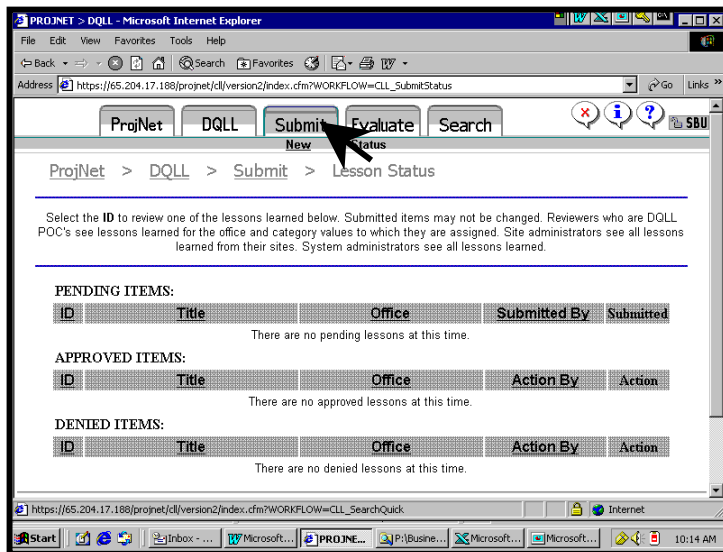
__Note:__ The categories defined on this screen are the parameters by which a submitted lesson is identified for documentation and retrieval. Lessons are typically identified by Category Code, Design Discipline, Location, and Customer.

Submitting Lessons Learned (continued)

3. When the relevant categories have been selected, click on "Continue".
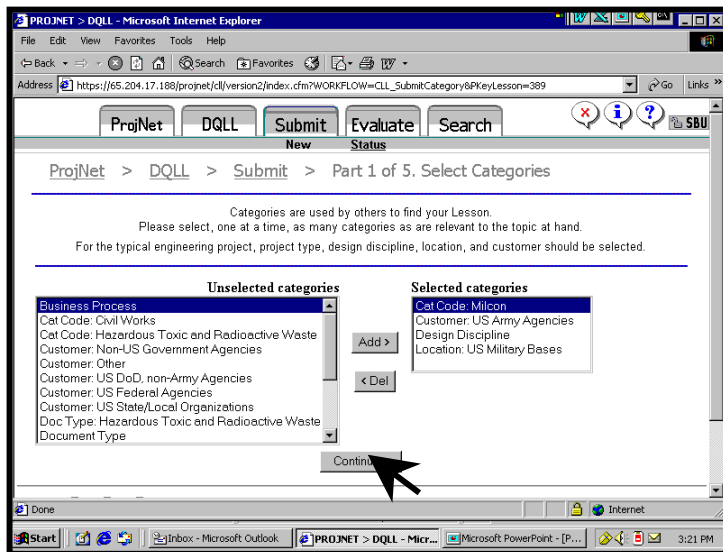
4. Select the appropriate value for each category, and click on "Continue".
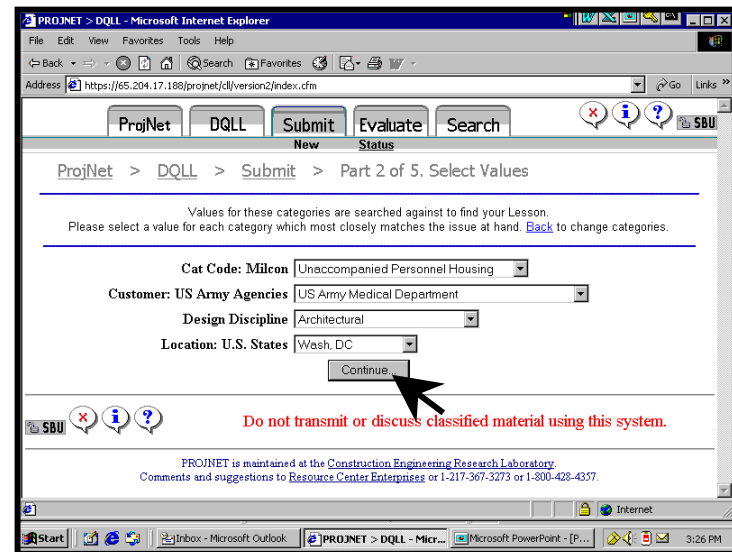
Note: *Select the values within each category that most closely match the proposed lesson. If you wish to revise the categories, return to the previous screen by clicking on the "Back" arrow.*

Submitting Lessons Learned (continued)

5. Select relevant effects of the submitted lesson (optional); then scroll down.

6. Complete the lesson description section, including the proposed solution.

Submitting Lessons Learned (continued)

7. To attach reference files to the lesson, use the "Browse" feature
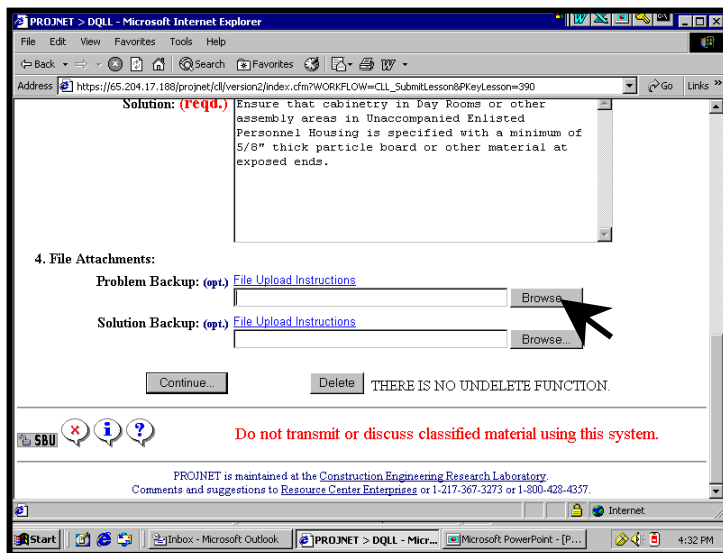
8. Click on "Continue" to submit the lesson for evaluation.
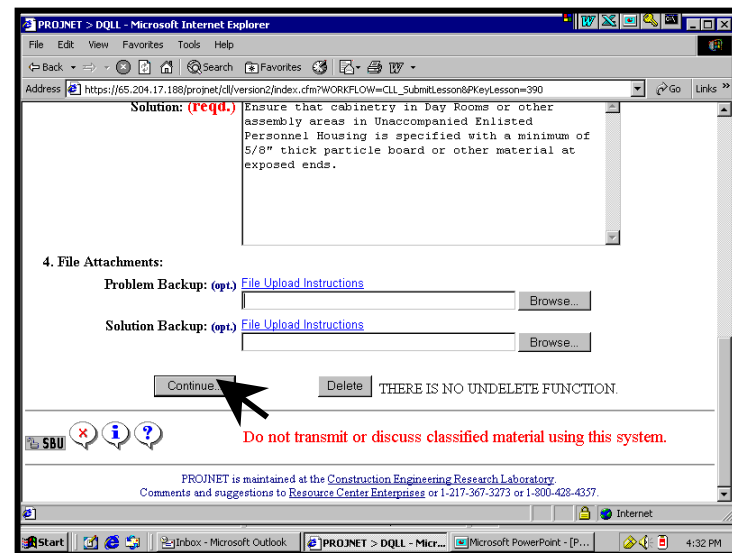
__Note:__ Notification of pending lessons are automatically forwarded to designated technical representative in the district for review. Only lessons approved by these representatives are incorporated into the DQLL data base.

Evaluating Lessons Learned

1. Click on the "Evaluate" tab at the top of the screen.

2. Select the lesson to be evaluated.
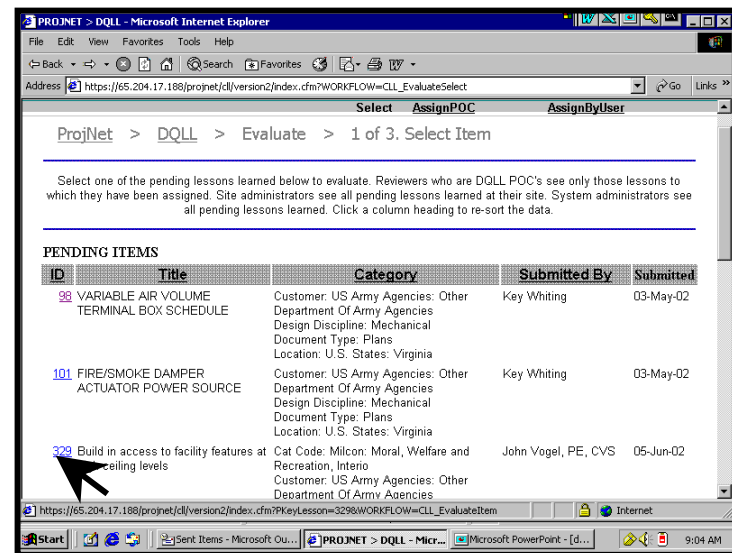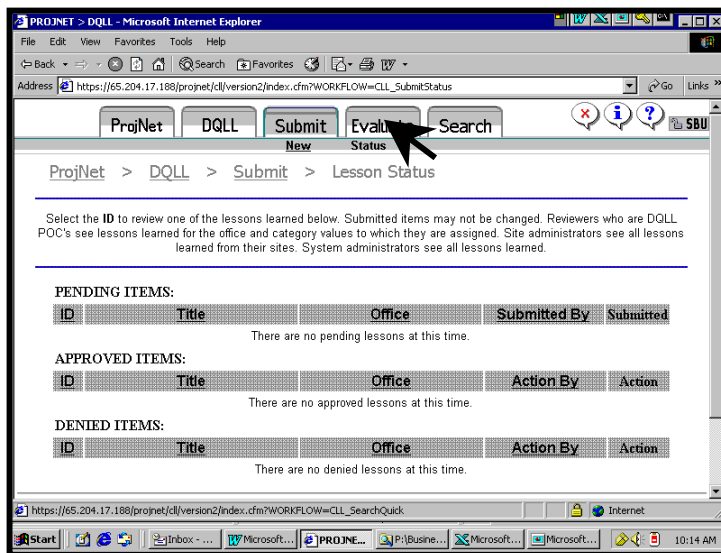
Note: *Points of Contact (POC's) have been designated for each discipline category to evaluate lessons. POC's are notified by e-mail when a lesson is submitted for their evaluation. POC's may also delegate the lesson evaluation to another reviewer.*

Evaluating Lessons Learned (continued)

3. Review the proposed DQLL; then scroll down to the evaluation section.

4. Indicate if the lesson is approved/denied, and provide comment. Click on "Submit".

__Note:__ A copy of the completed evaluation is automatically forwarded to the submitter of the lesson.

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Searching Lessons Learned

1. Click on the "Search" tab at the top of the screen.

2. Enter a keyword, select the desired site, and click on "Search".
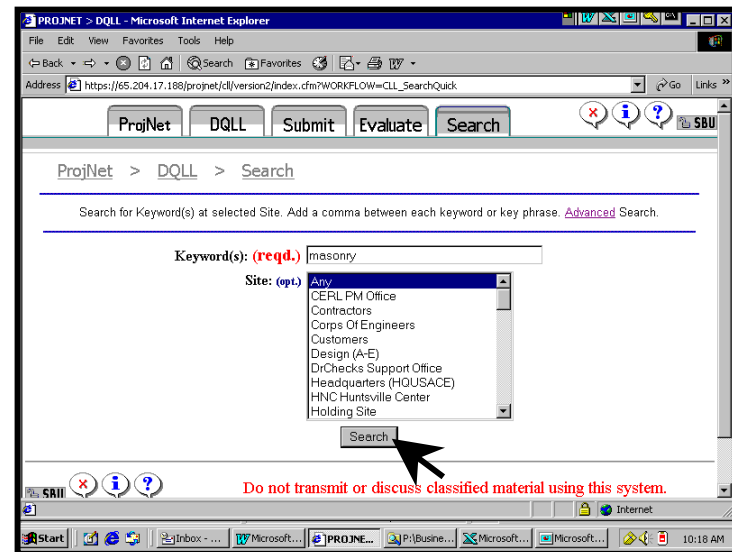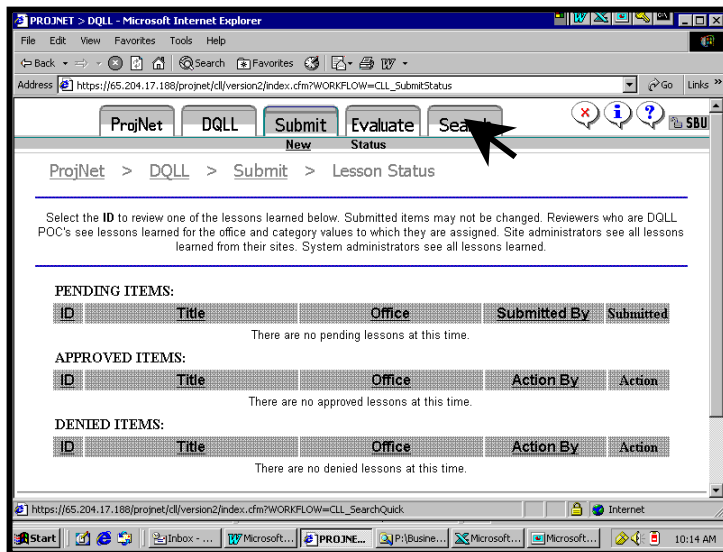
> **_Note:_** _Select the "Any" site to search all approved lessons learned throughout USACE. For a district-, customer-, or location-specific search, choose an alternate site from the list as appropriate._

Searching Lessons Learned (continued)

3. DQLL using the selected search criteria are displayed.
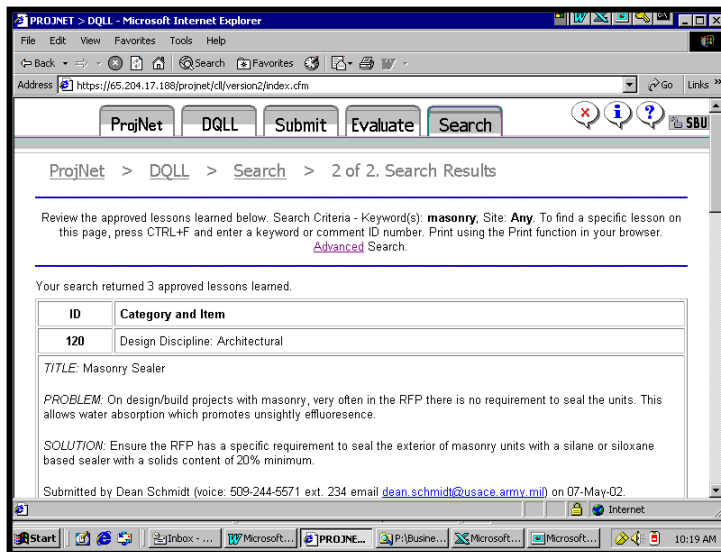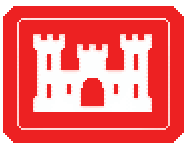
Getting Help

1. To search the site's technical notes and help desk topics, select the "Search" tab. On the next screen, select the help format and keyword, and click "Search".
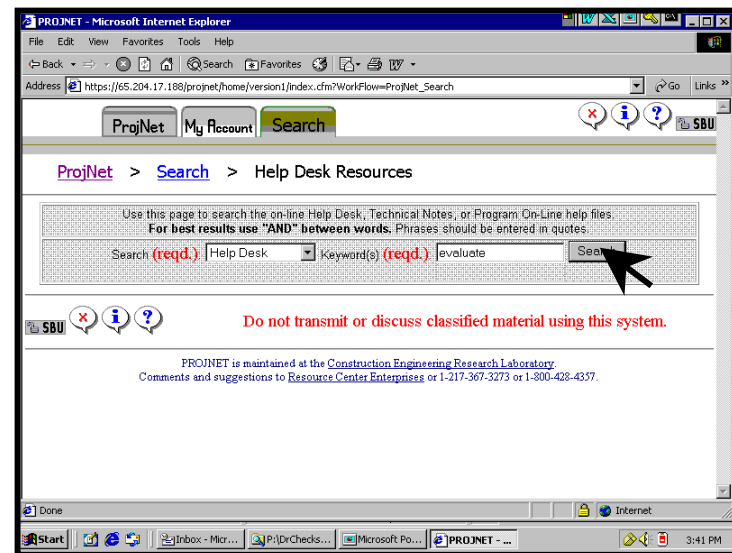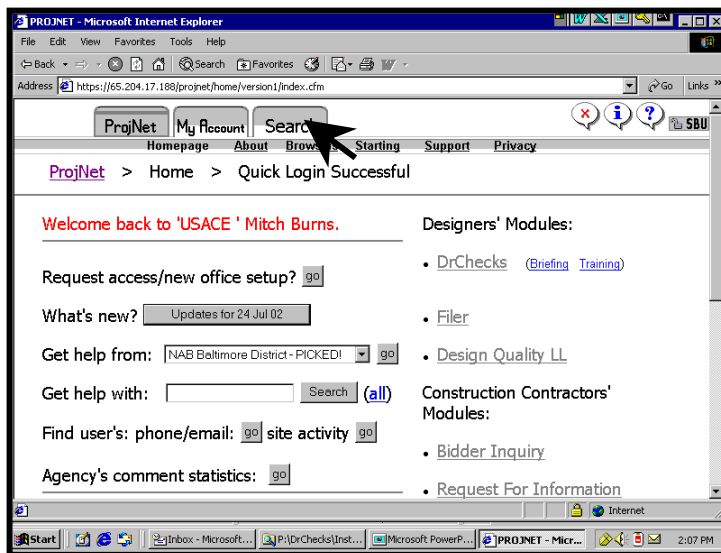
Getting Help (continued)

2. You can also use "Get help with:" to search the site. Enter a keyword and click "Go". Help desk notes that include the keyword in the body of the text will be displayed.
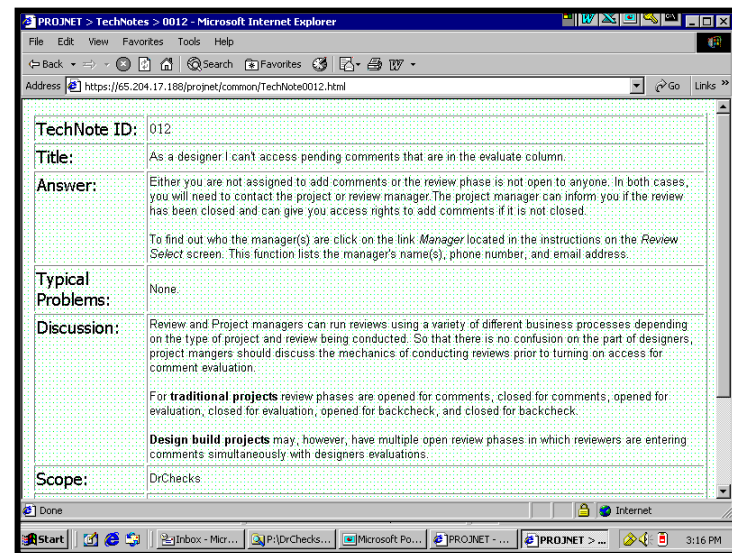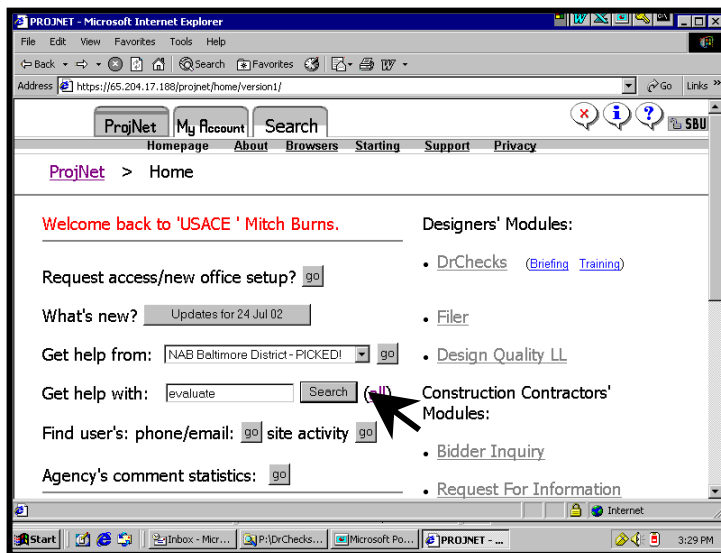
Getting Help (continued)

3. To browse through the complete list of technical notes and help desk topics, click "All".
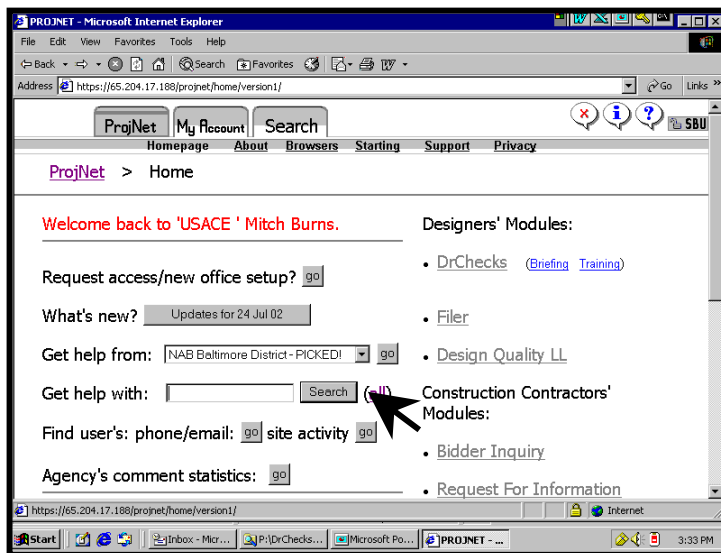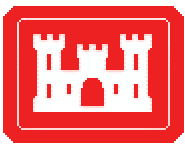
Getting Help (continued)

4. For online information, click on the "*i*" link that appears in the upper right corner of each screen. Online help, including a page description and instructions, will be displayed.
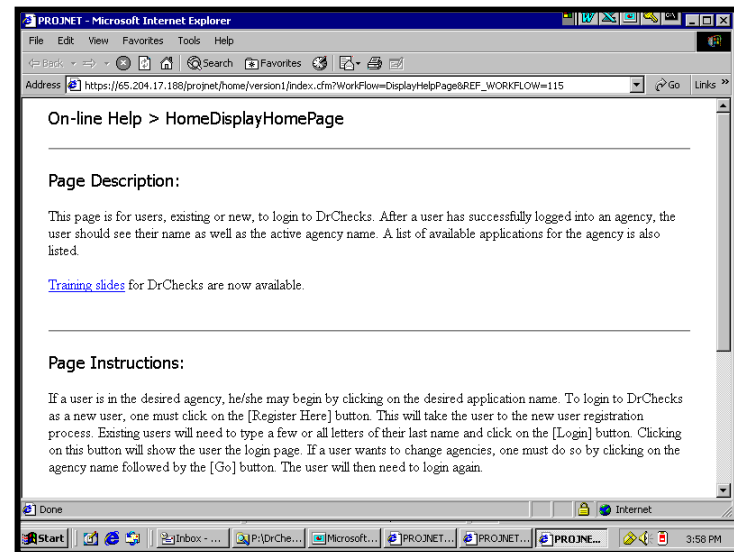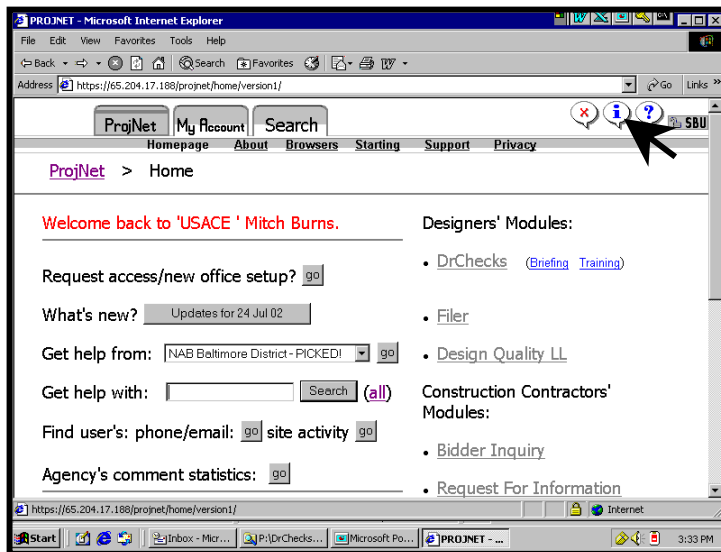
Getting Help (continued)

5. If you need further assistance, contact a Baltimore District administrator or manager through the "Get help from:" feature. Select "NAB Baltimore District" and click "Go" to display contacts.
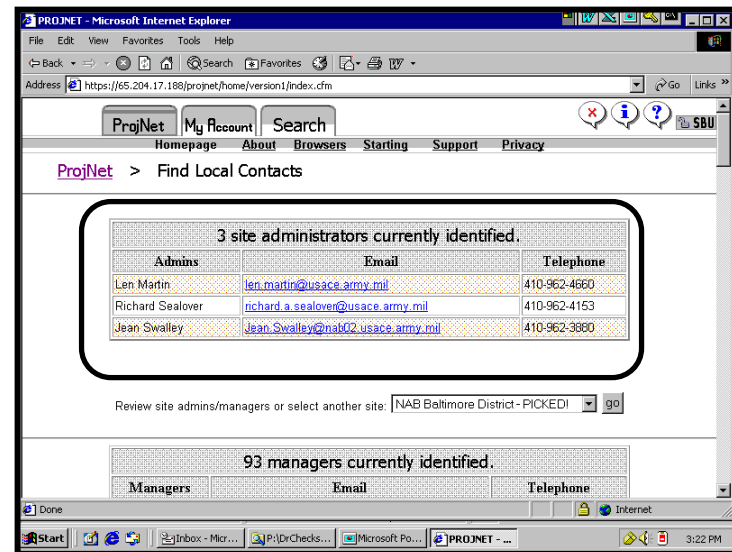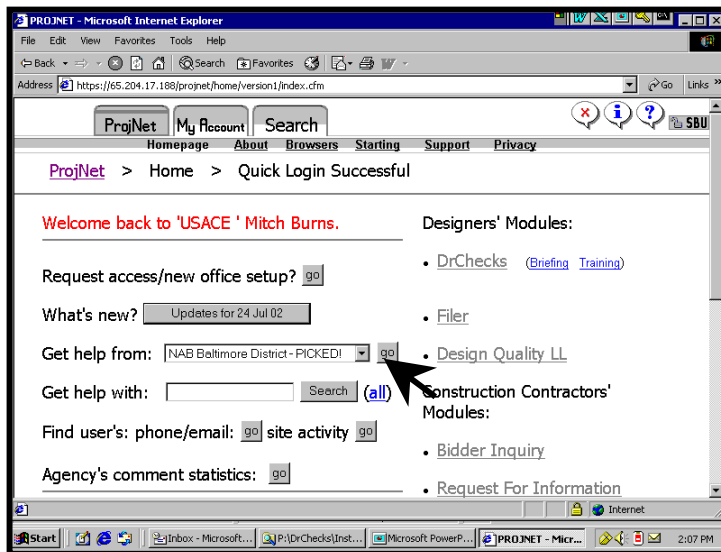
Note: _You may also contact a Site Administrator at the ProjNet Help Desk at (217) 367-3273 or (800) 428-4357 Monday through Friday, 8 a.m.-5 p.m. central time._

Frequently Asked Questions (FAQ)

Do I have to use DrChecks for my design reviews?

The use of DrChecks is mandatory for projects developed by the U.S. Army Corps of Engineers (USACE).

Why am I getting "Script Error" messages when I log into ProjNet?

ProjNet is designed to work with Internet Explorer Version 5.0 or later. If you are using earlier versions, or are using Netscape browsers, you will receive "Script Error" messages. You may disregard these messages and click "yes" to continue. To install free Internet Explorer Version 5.0 software, go to http://www.microsoft.com/ie.

Frequently Asked Questions (FAQ)

Why is ProjNet running so slow?

Several factors contribute to the speed of the ProjNet system, including server speed, internet traffic, and the number of ProjNet users/actions at the time. In general, east coast users will find the system to be slower in the afternoon, and should plan accordingly. To determine whether the internet traffic is causing the problem, click on the Internet Traffic Report link on the ProjNet homepage to check the current status for the Chicago router.

When I go to my DrChecks Projects page, why don't I have any projects listed?

Projects will appear on your project list only once you have been assigned access to the project reviews by an administrator or project manager. If you need access to a project that doesn't appear on your list, contact a Local Administrator.

In the "Add" column is the statement "closed for comment entry/edit". Can I still submit comments?

The review has been closed to new comments. If you wish to submit late entries, contact the Project Manager or Design Team Leader to discuss.

Frequently Asked Questions (FAQ) (continued)

**Why aren't the numbers in the Comments columns on the Review page highlighted?**

The review phase may have been deactivated. For example, the number links in the "Add" column are deactivated when no new comments are being accepted. You may also not be assigned to that particular review function. For example, if the number in the "Evaluate - Pending" column isn't highlighted, then you are not currently assigned as an evaluator on the review. If you need assistance, contact a Local Administrator.

What do I do about comments that are incorrectly assigned to my discipline for evaluation?

If a comment discipline has been assigned incorrectly, contact a Local Administrator to reassign the comment.

Can I backcheck someone else's comments?

Yes. In the "Check" column on the Review page, click on the blue highlighted word "My" to change it to "All". The number link in this column now reflects all of the comments to be backchecked. Click on the pending backcheck link and use the search features described in the "Selecting Comments" section of this manual to locate the specific comments for backchecking.
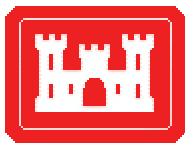
Frequently Asked Questions (FAQ) (continued)

How can I print the review comments?

You can print directly from the DrChecks reports screens. See "Tracking Features" for a summary of report generation.

How can I archive review comments and other documentation for my project records?

Print comments or other documentation to a .PDF file and save it with your project files. (You will need the Full version of Adobe Acrobat.)

How can I request program changes for the next version of ProjNet?

Use the "?" link in the upper right corner of the screen to go to the help submittal form.